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ABSTRACT

The second volume of an eight-part series on a task-based management system for special education programs offers detailed procedures for use of the task base composite (TBC), a listing of approximately 700 task descriptions classified under 20 functions and divided according to whether the task is necessary to support a program or directly necessary for the education of pupils. Use of the TBC is related to program definition and development, task identification, responsibility assignments, staff loading, development of job descriptions, and resource allocation. For example, task identification is said to involve the following steps: posting the TBC chart, collecting learner objectives from all teachers, estimating the total number of pupils for whom the behavioral strands apply, reviewing the TBC chart to determine which program tasks are necessary for the attainment of learner objectives, determining which of the 20 functions are required to operate the program, and determining personnel positions involved in completing each task. Included are samples of TBC position worksheets, job description forms, resource calculation sheets, procedures evaluation forms, and chart evaluation forms. (For related information, see also EC 050 205 and EC 050 207 through EC 050 212.) (GW)

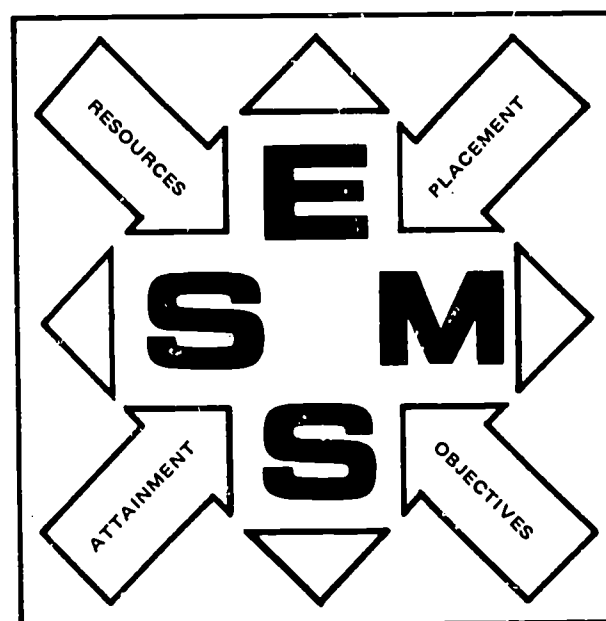
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A GUIDE FOR THE
MANAGEMENT OF
SPECIAL EDUCATION
PROGRAMS

MENTALLY AND
BEHAVIORALLY
EXCEPTIONAL
CHILDREN

Project Number 44-00000-0000-925
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SPECIAL EDUCATION MANAGEMENT SYSTEM

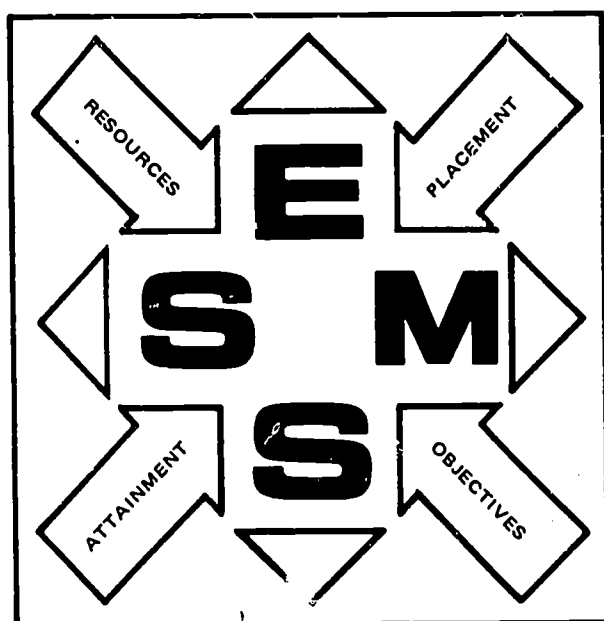
2.0 PROCEDURES FOR USE OF THE TASK BASE COMPOSIT

RICHARD D. STRUCK
Project Director and Director
of Programs for Exceptional
Children and Adults and
Pupil Personnel Services

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701 OCEAN ST. ROOM 200
Santa Cruz, California 95060
Dr. RICHARD R. FICKEL, SUPERINTENDENT OF SCHOOLS

EC 050 206E

2.0



SPECIAL EDUCATION MANAGEMENT SYSTEM

2.0 PROCEDURES FOR USE OF THE TASK BASE COMPOSITE

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701 OCEAN ST. ROOM 200
Santa Cruz, California 95060
Dr. RICHARD R. FICKEL, SUPERINTENDENT OF SCHOOLS

Prepared Under
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VORT CORPORATION
2100 Hanover St.
Palo Alto, Calif. 94306

COMPONENT 2.0

PROCEDURES FOR USE OF THE TASK BASE COMPOSITE

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This component offers procedures for using the Task Base Composite (TBC) chart and related management procedures. Suggested steps are grouped into the following major sections:

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TBC PROCEDURES EVALUATION FORM.	page 2-20
TBC CHART EVALUATION FORM	page 2-21

In order that the TBC serves the purpose for which it was designed, all steps listed should be carefully considered. The chart is designed to be used in conjunction with the worksheets and forms contained and described in the procedures. These forms may be removed and copied for use with the TBC procedures.

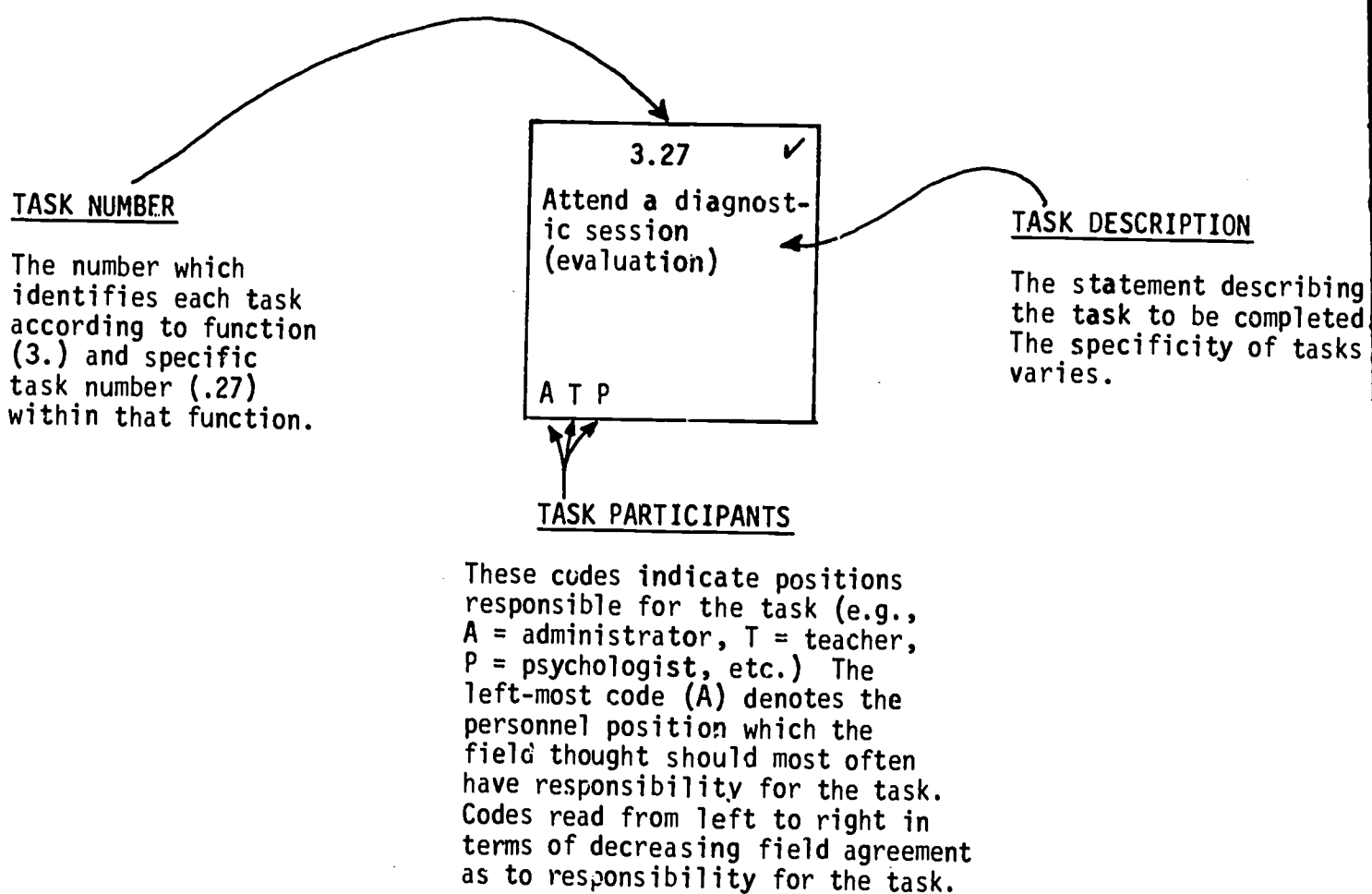
The TBC, as discussed in Component 1.0, is a means for describing the process of program management in terms of staff tasks. The TBC is a tool which will require close review and careful practice before the administrator or staff can become adept in its use. Please read Section 1.0 for TBC background, development, and suggested uses. Proper use of the TBC will require use of the Behavioral Characteristics Progression (BCP) as described in Components 5.0 - 7.0 to determine the characteristics of the specific group served and the resulting objectives.

The TBC is made up of about 700 task descriptions organized under 20 functions. Each task appears in a separate block. The TBC has two basic sections which can help the program administrator make his

program operations visible. The top of the TBC, containing umbrella tasks, represents those responsibilities which are necessary to support a program. The umbrella tasks do not have any set sequence or priority structure, but were placed in as logical an order as possible. The bottom part of the TBC, containing process tasks, represents those responsibilities which are directly necessary for the education of the pupil. These process tasks relate to 13 of the 20 functions and are arranged in approximate sequence.

TASK IDENTIFICATION AND RESPONSIBILITY ASSIGNMENTS

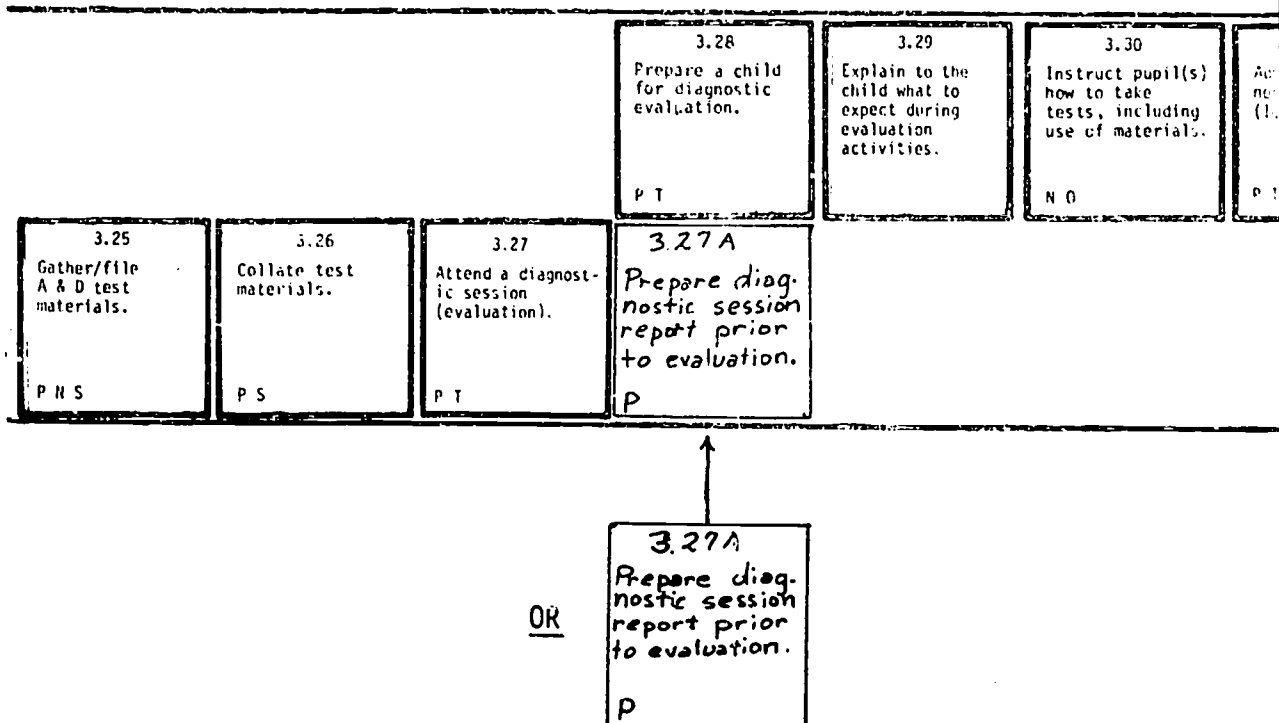
- 1.0 Post the Task Base Composite (TBC) chart on a wall or place on a large table so it can be easily read.
- 2.0 Study the chart to become familiar with its content. Review each of the 20 functions and the sequence of tasks within each function.
- 3.0 Study the structure of the task block. See example following Step 9.0.
- 4.0 Record any alterations in functions, tasks, sequencing, or position responsibility on the Task Base Composite Evaluation Form at the end of this component.
- 5.0 Collect from all teachers the learner objectives descriptive of the population served by the program. Group objectives into behavioral strands or specific skill areas (e.g., Development Center program includes objectives from strands Eating, Drinking, Toileting, Dressing, Undressing, Gross Motor I, Interpersonal Relations, etc.)
- 6.0 Estimate the total number of pupils for whom these behavioral strands apply (number of pupils in the program). Record this number in the top right corner of the TBC chart.
- 7.0 Review the TBC chart to determine which program tasks are necessary for the attainment of learner objectives. Base this review on the summaries of program content obtained in Step 5.0.
 - Program staff may be included in this review.
 - A different TBC chart should be developed for each program.
- 8.0 Determine which of the 20 functions are required to operate the program.
- 9.0 Check those tasks necessary to attain learner objectives in each of the required functions. It is suggested that a colored felt-tipped pen be used and that the check be placed in the upper right-hand corner of the task block. See example below.



- 10.0 Determine if reworded task descriptions are necessary to better tailor the TBC content to the program.
- 11.0 Reword task descriptions inside the task block or outside and connect with an arrow (see example following Step 15.0).
- 12.0 Determine whether the delivery process of the program is adequately described by those tasks

identified. Identify omitted tasks.

- 13.0 Determine appropriate placement of omitted tasks in the sequence come before and after those identified in 12.0. Decide whether the Prime Line of the educational process.
- 14.0 Assign a new task number to omitted tasks by adding a letter (e.g., a new task to be inserted between 3.27 and 3.28 would be 3.27A and 3.28 would be 3.27B, 3.27C, 3.27D, etc.).
- 15.0 Enter omitted tasks in correct sequence on the chart or write and connect with an arrow. See example below:

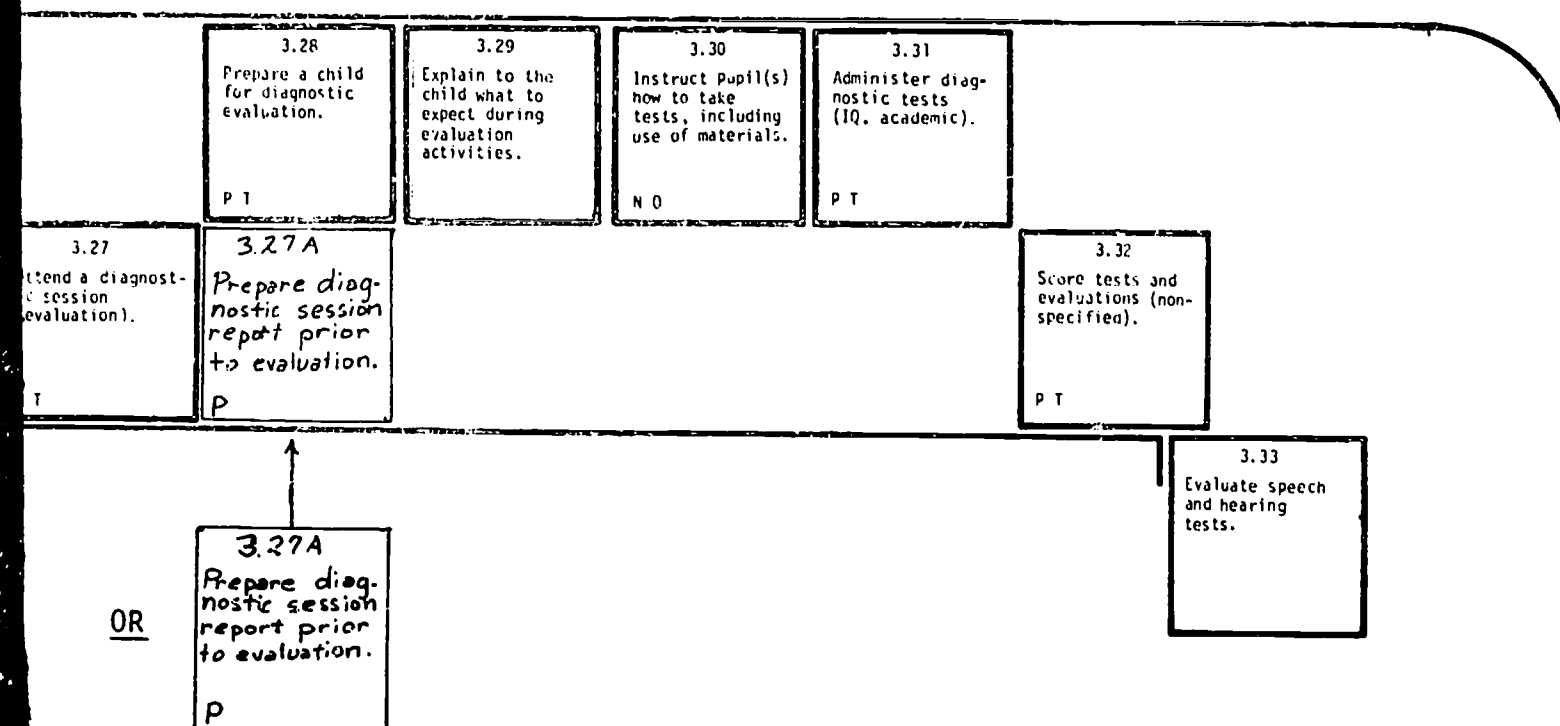


ied. Identify omitted tasks.

ne appropriate placement of omitted tasks in the sequence by considering which tasks should
fore and after those identified in 12.0. Decide whether task belongs on the Non-Prime or
me Line of the educational process.

a new task number to omitted tasks by adding a letter to the previous task number (e.g.,
task to be inserted between 3.27 and 3.28 would be 3.27A: Further additions between 3.27
B would be 3.27B, 3.27C, 3.27D, etc.).

mitted tasks in correct sequence on the chart or write omitted task outside the process
nect with an arrow. See example below:



- 16.0 Determine those personnel positions involved in completing each task. (See Steps 17.0 and 18.0 below.) Use the data sheets in Component 4.0 entitled "Suggested Task Responsibility" and present program information as guidelines in this determination.
- 17.0 Circle the position symbol(s) in each task block which indicates the position(s) that will be responsible for task completion. See example below. The position codes used on the TBC chart are:

A = Administrator (superintendent, director, coordinator)
 B = Business Office
 C = Consultant
 S = Secretary
 P = Psychologist
 N = Nurse
 T = Teacher (certificated, permit, itinerant)
 R = Resource teacher
 I = Instructional aide
 G = Parent or guardian
 J = Janitor or custodian
 O = Others, including volunteers, speech therapists,
 physical therapists, social workers, etc.

3.27	✓
Attend a diagnostic session (evaluation).	
(P) T	

Additional codes may be developed and used as necessary.

- 18.0 Add position symbols to task blocks lacking symbols and to those blocks which require additional symbols. Circle added symbols. If a task exists which is necessary for program operation but for which no position is presently responsible, a new position may be created or a current position expanded to encompass this task. See example below.

3.28	✓
Prepare a child for diagnostic evaluation.	
P T	(A)

3.29	✓
Explain to the child what to expect during evaluation activities.	
	(T)

- 19.0 Assign position responsibility to all checked tasks.
- 20.0 Review TBC chart to ensure that all checked tasks have at least one position symbol circled.

POSITION WORKSHEET COMPLETION

- 21.0 Review the Position Worksheet (see attached sample, page 2-17) to note heading information, the 9 columns, and the row which indicates the basis for entering data in each of the 9 columns.
- 22.0 Identify all positions for which there is at least one task assigned on the Task Base Composite.
- 23.0 Complete a separate Position Worksheet for each of the positions identified in 21.0. Include program name, position title, position symbol; and indicate the individual responsible for completing the worksheet. Do this for each worksheet.
- 24.0 Record the date that each Position Worksheet is started.
- 25.0 Read through all checked TBC tasks beginning with the umbrella tasks and ending with the process tasks. Note on which Position Worksheet each task belongs.

- 26.0 Record the number of each task from the BCP on the appropriate Position Worksheet. Enter this task number in Column 1 on the worksheet. Do this for all tasks assigned to the respective position, and record the task numbers in sequence from the TBC onto the worksheet.
- 27.0 Determine if each task is continuous or non-continuous. Continuous tasks are those which occur throughout the entire school year, such as Task 9.003, "Instruct and supervise in feeding/eating skills." A non-continuous task is one which occurs only at intervals during the school year (not daily or weekly) due to seasonal factors, beginning of the year, etc. Such a task would be Task 3.31, "Administer diagnostic tests." Record "c" or "n" next to the respective task number. If non-continuous, go to Step 30.0.
- 28.0 Determine the time period (number of weeks) over which each continuous task occurs during a 180- (36 weeks) or 220-day (44 weeks) contract period. Record this figure in Column 2 on the worksheet.
- 29.0 Estimate the average number of hours per week spent on each continuous task for all pupils involved. Record this figure in Column 7 and proceed to Step 35.0 of these procedures.
- 30.0 Determine the time period (number of weeks) over which each non-continuous task will occur. For example, does it occur just the first 7 weeks of the school year, 7 weeks a year at random intervals, etc. Record this figure in Column 2 on the worksheet.
- 31.0 Determine the number of pupils to whom each non-continuous task applies during the time period recorded in Column 2. Record this figure in Column 3. For example, if during the 7-week period, 70 children were involved, record 70 in Column 3. Base this estimate on the summaries of learner objectives in terms of behavioral strands obtained in Step 5.0 and on present program information.
- 32.0 Divide the number of pupils in Column 3 by the number of weeks in Column 2, and record the results in Column 4. This will yield the average number of pupils to whom each non-continuous task applies on a weekly basis.

- 33.0 Estimate the time in minutes necessary to complete each non-continuous task per pupil. Use data sheets in Component 4.1 and/or staff estimates to aid in this determination. Record this figure in Column 5.
- 34.0 Estimate the frequency of occurrence of each non-continuous task per pupil per week. Record this figure in Column 6. Use data sheets in Component 4.1 and/or staff estimates.
- 35.0 Multiply Column 4 x Column 5 x Column 6 to calculate the time per week in minutes for all pupils involved per week in each non-continuous task. Divide this product by 60 (minutes per hour) to convert to hours per week. Record this figure in Column 7.
- 36.0 Multiply Column 2 x Column 7. Record the product in Column 8. This will represent the total time (in hours) required to complete each task (both continuous and non-continuous) per the time period shown in Column 2.
- 37.0 Divide the product in Column 8 by 40 (hours per week) to convert the total time to man-weeks. This figure will represent the number of man-weeks required to complete the task. Record this figure in Column 9 for each task.
- 38.0 Add up all the man-weeks in Column 9. Record this sub-total in the space provided at the bottom.
- 39.0 Add sub-totals at the bottom of all pages for each position. Record on top of Page 1 in Total Man-Weeks blank.
- 40.0 Divide total man-weeks by the maximum contract period (in weeks) for that position (e.g., 180-day contract = 36 weeks, 220 days = 44 weeks). Record the dividend in the space labeled "Personnel Required" at the top of Page 1. This figure represents an estimate of the number of individuals required to complete the tasks per position for the given contract period.

STAFF LOADING

- 41.0 Determine the number of persons presently employed in the program for each personnel position.
- 42.0 Compare the number of persons presently employed (Step 41.0) to the number estimated from the Position Worksheet (Step 40.0).
- 43.0 Discuss with representatives of each position possible task revisions, additions and clarifications. Agreement should be reached regarding task responsibilities for each position.
- 44.0 Proceed to Step 48.0 if the number of persons employed approximates the number of persons required. If not, proceed to Step 45.0.
- 45.0 Review all data on the Position Worksheet if the number of persons employed does not match the number of persons required. Include in this review tasks, task times, number of pupils, frequencies and totals to ensure accurate calculations.
- 46.0 Make adjustments on Position Worksheets so that the number of persons required per the Worksheets approximates the number of persons presently employed for each position. Consider the following:
 - 46.1 Reassign tasks to other positions possessing the skills and time to complete the tasks successfully. Plan and provide for in-service if reassigned position has the time but not the skills required.
 - 46.2 Increase or decrease the time period of the task.
 - 46.3 Increase or decrease the number of pupils served by the completion of the tasks.
 - 46.4 Increase or decrease the frequency of the task.
 - 46.5 Arrange to transfer the task to another agency or subcontractor.
 - 46.6 Eliminate the task from the program.

- 46.7 Hire additional personnel per position according to established personnel procedures.
- 47.0 Make all necessary corrections/adjustments on the Position Worksheets and TBC chart to reflect any changes made in 45.0 and 46.0.

JOB DESCRIPTIONS

- 48.0 Review Task Base Composite Job Description Form (see attached sample, page 2-18) Complete the heading information including program name, position, symbol, individual's name, personnel file #, date hired, supervisor, special skills, page number for each individual staff member in each position.
- 49.0 Add to TBC Job Description Form any additional information required to better define job responsibilities. Attach any pertinent data to the back of the form.
- 50.0 Transfer each task number (e.g., 3.27) from Column 1 on the Position Worksheet to Column 1 on the Job Description Form.
- 51.0 Copy each task description from the TBC chart onto Column 2 of the Job Description Form. Include any additions or alterations as they appear on the chart.
- 52.0 Record the tentative dates that each task is to be started and completed in Column 3 on the Job Description Form. The number of weeks in Column 2 on the Position Worksheet serves as the basis for determining these dates.
- 53.0 Discuss with each individual staff member the tentative TBC Job Description Form developed for him. Make revisions, additions, clarifications to this form as necessary.
- 54.0 Obtain agreement from each staff member regarding the tasks and start and completion dates on the TBC Job Description Form.

- 55.0 Determine with staff member whether in-service training is required to improve the individual's skill level in order to complete each of the assigned tasks.
- 56.0 Check Column 4 if the staff member requires in-service to complete a specific task.
- 57.0 Determine with staff member what specific skill training is necessary for each task and how and when this training will be provided or obtained. Enter this information in Column 5 of the form.
- 58.0 Decide with staff member performance requirements for each task or group of tasks. A percentage of task completion (e.g., teacher attains 75% of learner objectives, or secretary files information so that 90% of the filed material is retrieved when requested) or any other agreed upon standard requirement may be used (e.g., clerk posts daily information by 10:00 a.m.). Record this requirement(s) in Column 6 on the TBC Job Description Form.
- 59.0 Obtain signature of supervisor (or administrator) and the individual staff member at the top right corner of the TBC Job Description Form. These signatures demonstrate agreement between the supervisor and the individual regarding job tasks and performance requirements.
- 60.0 Send TBC Job Description Form to the personnel office to ensure that all civil service, credentialing and other requirements are met. This form can be used by the personnel office as a basis for future hiring.
- 61.0 Provide each individual staff member with a copy of his Job Description Form. File additional copies. Make copies available for staff reference to improve staff coordination and communication.
- 62.0 Review the status of the task periodically (e.g., quarterly, bi-monthly, semi-annually) according to an established, individualized schedule. Decide with staff member whether task has been completed, is ongoing, or has been revised.
- 62.1 Enter this and additional information as necessary in Column 7 on the form.

- 62.2 Enter date of status review in Column 7 on the form.
- 62.3 Determine whether each staff member feels that necessary administrative, supervisory, professional, secretarial, and other support has been provided.
- 62.4 Identify which position and then which individual staff member is responsible for providing necessary support.
- 62.5 Make any necessary revisions, additions, or clarifications on identified support person's TBC Job Description Form.
- 62.6 Determine whether (additional) in-service training is required at this time to provide the staff member being reviewed with necessary skills. Record this information in Column 5.
- 62.7 Return to Step 46.0 if in-service training or support is not sufficient for the staff member to complete the task.
- 62.8 Enter actual start and complete date of task during status reviews in Column 8 on TBC Job Description Form.
- 63.0 Provide each individual staff member with a copy of his TBC Job Description Form as revised. File Copies and distribute as in Step 61.0.
- 64.0 Hold future meetings between supervisor(s) and staff member(s) if there are disagreements regarding job responsibilities. The TBC Description Form should be used as the basis for discussing and solving these disagreements.

RESOURCE CALCULATIONS

- 65.0 Review Resource Calculation Sheet (see sample attached, page 2-19). Fill in program, position, symbol completed by, page number, and date for each personnel position in the program.
- 66.0 Transfer each task number (e.g., 3.27) from Column 1 on the Position Worksheet to Column 1 on the Resource Calculation Sheet.
- 67.0 Transfer the man-week estimate for each task from Column 9 on the Position Worksheet to Column 2 on the Resource Calculation Sheet.
- 68.0 Compute the average salary (including benefits) per contract period for each personnel position in the program. Record this figure in Column 3 of the Calculation Sheet. This information can be obtained from the payroll department.
- 69.0 Enter in Column 4 the maximum length (in weeks) of the contract period for each position (e.g., two psychologists contracted for 36 and 44 weeks result in 44 being entered in Column 4).
- 70.0 Divide Column 3 by Column 4 to obtain the average weekly salary for each position. Enter this figure in Column 5 on the Calculation Sheet.
- 71.0 Multiply Column 2 by Column 5 to obtain cost of personnel required for each task. Enter this figure in Column 6 on the Calculation Sheet.
- 72.0 Identify facilities and materials necessary for each task.
- 73.0 Estimate the cost of facilities for each task. Enter this figure in Column 7 on the Calculation Sheet. Refer to the program budget using the Object Code of the New California School Program Accounting Manual.
- 74.0 Estimate the cost of materials for each task. Enter this figure in Column 8 on the Calculation Sheet. Refer to the program budget.

- 75.0 Add Columns 6, 7 and 8 of the Calculation Sheet to obtain an estimate of the task cost for each position. Enter this figure in Column 9.
- 76.0 Add the costs (from Column 9) for each task with the same task number for all positions. This results in a total cost per task for all positions involved in task completion. Record these figures on a separate sheet of paper and attach to Resource Calculation Sheets.
- 77.0 Add all total task costs (Step 76.0) to determine program costs. Record on top of page 1 in Total Program Cost blank.
- 78.0 Compare the costs per task obtained in Step 76.0 to the tasks related to learner objectives obtained in Step 7.0.
- 79.0 Determine if the learner objectives warrant the task costs. This determination should be based upon the number of pupils affected, the benefits derived from the objectives, and the importance placed on the objective by the community. If objectives warrant task costs, proceed to Step 82.0.
- 80.0 Decide upon one of the following options if learner objectives do not warrant task costs. Consider whether each option realistically meets the needs of the pupils, the staff, and the program:
- 80.1 Reassign task to a position with a lower average weekly salary (e.g., from teacher to aide). Such a reassignment will lessen the cost of personnel (Column 6 on the Calculation Sheet). The new position must have the time and skills necessary to complete the task.
 - 80.2 Decrease the number of pupils served by the task (Column 3 on the Position Worksheet). Such a decrease will lessen the cost of personnel (Column 6 on the Calculation Sheet).
 - 80.3 Decrease the task time (in minutes) required to complete the task (Column 5 on the Position Worksheet). Such a decrease will lessen the cost of personnel (Column 6 on the Calculation Sheet).

- 80.4 Decrease the number of occurrences per week of the task (Column 6 on the Position Worksheet).
Such a decrease will lessen the cost of personnel (Column 6 on the Calculation Sheet).
- 80.5 Decrease the amount and/or type of facilities necessary for task completion to lessen the cost of facilities (Column 7 on Calculation Sheet).
- 80.6 Decrease the amount and/or type of materials and equipment necessary for task completion to lessen the cost of materials (Column 8 on Calculation Sheet).
- 81.0 Update all TBC forms and the TBC Chart to reflect any changes made in 79.0 and 80.0.
- 82.0 Request necessary program resources to complete original or revised tasks warranted by learner objectives.
- 83.0 Fill out and return the TBC Procedures Evaluation Form and the TBC Chart Evaluation Form, pages 2-20 and 2-21.

TBC POSITION WORKSHEET

Program _____

Position _____

Completed by _____ Total Man-weeks _____ Per _____

[illegible]

Pg ____ of ____

TBC POSITION WORKSHEET

Date _____

Symbol _____

Total Man-weeks_____ Personnel required

NON-CONTINUOUS ONLY

[illegible]

Sub-total

TBC JOB DESCRIPTION FORM

Staff Member (sig.)

Program _____

[illegible]

Special Skills _____ Supervisor _____

[illegible]

TBC RESOURCE CALCULATION SHEET

Program _____

Position _____

Completed by _____

[illegible]

Pg of

Date _____

Symbol

Total Program Cost _____



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TBC PROCEDURES EVALUATION FORM

STEP NO.	COMMENT/SUGGESTION/ALTERATION

Please fill out and return to: Richard D.
Santa Cruz
701 Ocean S
Santa Cruz,

VORT Corporation

TBC PROCEDURES EVALUATION FORM

Respondent _____

Title _____

District/County _____

COMMENT/SUGGESTION/ALTERATION

Please fill out and return to: Richard D. Struck
Santa Cruz County Office of Education
701 Ocean Street, Room 200
Santa Cruz, California 95060

Resp
Tit
Dist

Please fill out and return to: Richard
Santa C
701 Oce
Santa C

2-21

23 A

TBC CHART EVALUATION FORM

Respondent _____

Title _____

District/County _____

COMMENT/SUGGESTION/ALTERATION

r -- these two should be reversed.)

Please fill out and return to: Richard D. Struck
Santa Cruz County Office of Education
701 Ocean Street, Room 200
Santa Cruz, California 95060